



COMMON SERVICES FOR BORROWERS

"We Help America Manage Student Aid Obligations"

GB Panagon Gommon Retrieval

12/10/2007

System Logon

Sign into your terminal. On your desktop, double click on the CSB Common Retrieval icon.

Microsoft Internet Explorer

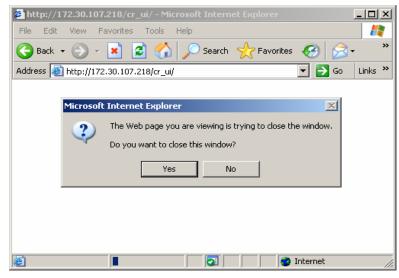
When signing into the CSB Common Retrieval System the Microsoft Internet Explorer box will ask. "Do you want to close this window?"

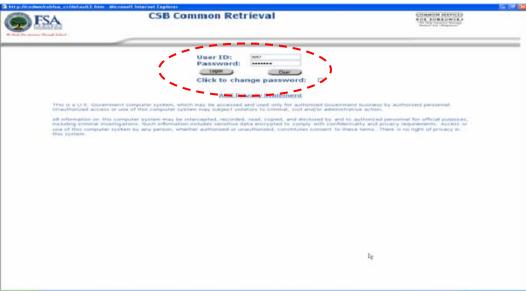
Click 'Yes' every time.

Logon Window

The Logon window prompts you to enter your *User ID(Panagon Processor Code)* and *Password*.

Your User ID is associated to every document that you work.





Logon - The 'Logon' button will verify your User ID and Password for the application.

Clear - The 'Clear' button will clear the text boxes in the window.

Click the 'Logon' button after entering your User ID and Password.

Click to change password – The "Click to change password" button will allow you to update your password when necessary.

Please note: If you are a new user you will be assigned a temporary password. You are therefore required at first logon, to check the box next to 'Click to change password'. However, you may choose to change your password at any time for any reason. Otherwise, the system will prompt you to change it every 90 days.

Please contact the CSB Help Desk at 1-888-291-2160 or email them at <u>csbhelpdesk@acsinc.com</u> for issues with your CSB Panagon User ID and or Password.

CSB Common Retrieval

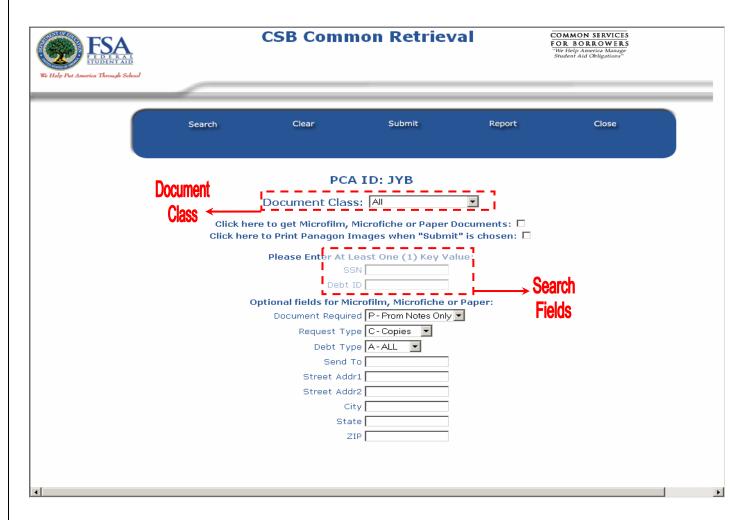
The CSB Common Retrieval window allows you to perform searches for a specific document or group of documents.

Document Class – The Document Class Selection Control allows the user to select the document class. The drop-down list box is initially populated with "All" as the document class selection.

You must enter at least one of the following to perform a search:

SSN – the borrowers Social Security Number. **Debt ID** – a Debt ID

Search Fields – You must enter a key value in one or more of the Search Fields in-order to perform a search. The key values include the SSN or Debt ID.



After you enter either the SSN or Debt ID, click one of the following options depending on your desired results. There will be a validation check that will go against DCMS mainframe to see if the user is requesting documents that are assigned to them. Accounts that are not authorized for your viewing will be restricted.

Search - The 'Search' button performs a search for the specified criteria that you input.

Clear - The 'Clear' button will clear the search fields in the window.

Submit – The 'Submit' button can only be selected once the user has performed a search. When requesting Microfilm, Microfiche, Paper or Panagon Images, you must have the appropriate box checked depending on whether you have a microfilm, microfiche paper or image request. Clicking 'Submit' will send a request for document(s) to be mailed to the user or a third party.

Report – The 'Report' button is non-functional.

Close – The 'Close' button closes the current window.

FSA STUDINTALD We Help Pat America Through School		CSB Comn	non Retriev		COMMON SERVICES FOR BORROWERS "We Help America Manage Student Aid Obligations"	
	Search	Clear	Submit	Report	Close	,
PCA ID: JYB						
Document Class: All						
Click here to get Microfilm, Microfiche or Paper Documents: Click here to Print Panagon Images when "Submit" is chosen:						
Please Enter At Least One (1) Key Value: SSN						
		Debt I		- B		
Optional fields for Microfilm, Microfiche or Paper: Document Required P-Prom Notes Only						
Request Type C-Copies						
Debt Type A-ALL						
		Send T				
		Street Add				
		Street Add	2			
		Cit	:у			
		Stat	e			
		ZI	IP			
1						

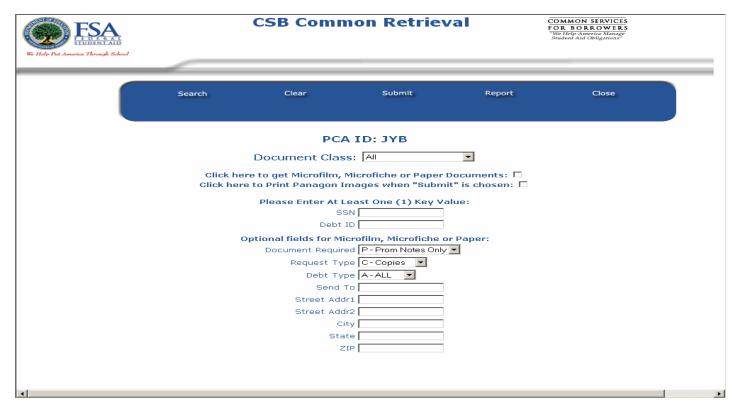
The following fields can be modified when requesting Microfilm, Microfiche, Paper or Printed Images:

Document Required – Select the Document required via a drop-down list: F= Entire File

P= Prom Notes Only

Request Type – Select the Request type via a drop down list: C = Copies
O = Originals

(Only FSA Can Request Originals)



Debt Type – Select the Debt Type via a drop-down list: **A** = All

D = FDSL G = GSL F = FISL N = NSL P = POVR

Third Party Requests cannot be mailed to a PO Box address. They must be mailed to a street address.

Send To – Enter the name and demographic information for a third party request.

Street Addr1*

Street Addr2 *

City *

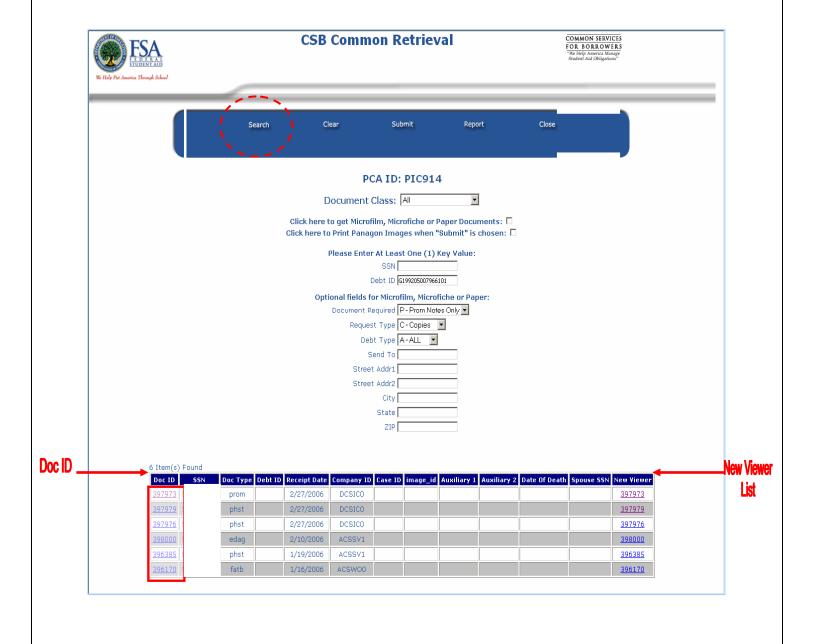
State*

Zip*

*Enter the pre-determined Street Address, City, State and Zip for this request.

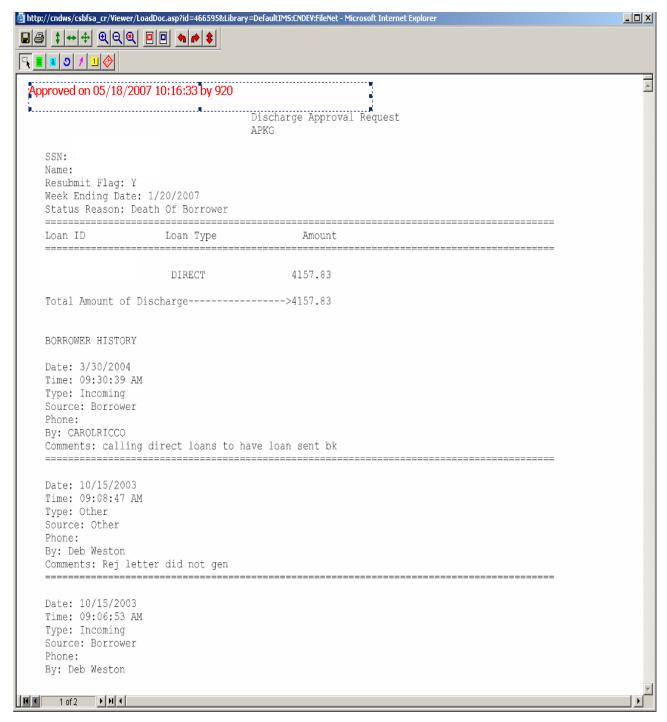
Results of a SSN or Debt ID Search

Once you enter an SSN or Debt ID, click the 'Search' button. To display an image click on a document ID under the 'Doc ID' or 'New Viewer' column.



Document IDM Viewer

The document is displayed via IDM Viewer when a document ID is clicked on under the '**Doc ID**' column. Any annotations pertaining to the document(s) are displayed on the top of the document image.



Example of a Retrieved Document

Document IDM Viewer Icon Definitions

Document Viewer displays the document image. The Document Viewer requires that you resize the window every time you Logon to Panagon.



Print – The print button prints the document.

Fit Page— The fit page buttons adjust the document image to fit the appropriate window. There are three buttons and are as follows:

- **1. Page Width Scales the image to fit the width of the Window.**
- **2. Page Length** Scales the image to fit the height of the **Document Viewer** displays the document image. The Document Viewer requires that you resize the window every time you Logon to Panagon.
- **3. Whole Page -** Scales the image to fit in the window in both directions.

Zoom – The zoom buttons adjusts the zoom level of the document image. There are three buttons and are as follows:

- 1. Zoom In Adjusts the zoom level in by 10% of the original document image.
- 2. Zoom Out Adjusts the zoom level out by 10% of the original document image.
- **3. Zoom Normal** Adjusts the zoom level to the original size of the document image.

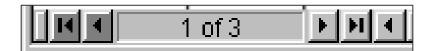
Navigator – The Navigator allows you to navigate over the document image.

Magnifier – The Magnifier will allow you to magnify any portion of the document. Click on the magnifier, then click and drag on the document (making a box as large or as small as needed).

Rotate – The rotate buttons rotate the displayed document image. There are three buttons and are as follows:

- 1. Rotate Right Rotates the document image to the right by 90 degrees.
- **2. Rotate Left –** Rotates the document image to the left by 90 degrees.
- **3. Upside-Down** Rotates the document image by 180 degrees.

Document Viewer Icon Definitions



Multiple page documents - The single arrows located at the bottom of the document will allow you to move from page to page or input the required page number in the box. The left double arrows allow you to go directly to the *first* page. The right double takes you to the *last* page.



Select-Encompasses annotations and allows you to move them around the page

Highlight-Opens a highlight box on the image

Text-Allows you to type comments in the box on the image

Pen-Allows you to write/draw lines on the image

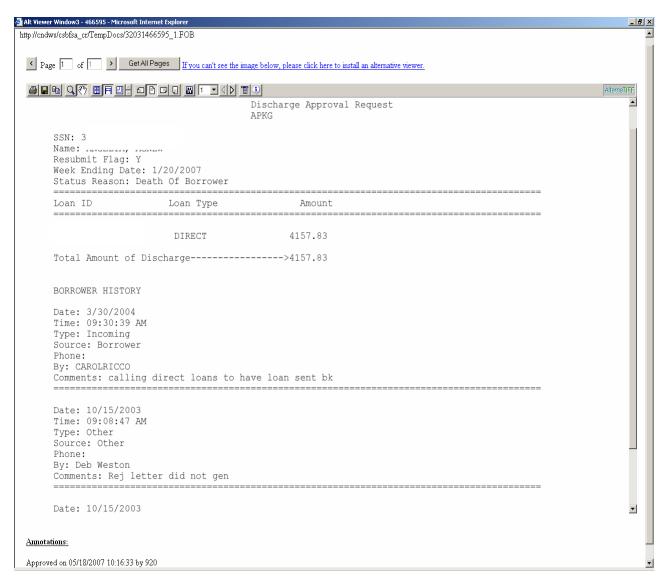
Arrow-Allows you to put an arrow or arrows on the image

Sticky Note-Allows you to place a sticky note with comments on the document

Stamp-Allows you to put stamp on document/Specific fields available

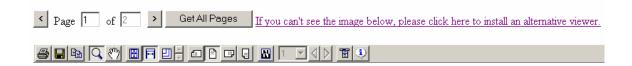
AlternaTIFF (Alternative) Viewer

The document is displayed via the 'AlternaTIFF (Alternative) Viewer' when a Document ID number is clicked under the 'New Viewer' column. Any annotations pertaining to the document(s) are displayed at the bottom of the window.



Example of a Retrieved Document

Document Alternatiff Viewer Icon Definitions



Page Arrows-Move from page to page using the forward and back arrows

Page Box-Input page number to move from page to page.

Get All Pages-Click to combine images for printing as a single document.

Print – The print button prints the document.

Save As-Save the tiff image to a folder location on your desktop.

Copy to Clipboard-Copy the tiff image to a document.

Zooming Mode-Allows you to click on image to increase and then decrease size back top normal.

Panning Mode-Allows you to move image up and down on screen.

Best Fit-Full image view

Fit to Window Width-Full image view but must scroll up and down page to view the whole iamge

Fixed Size (100%)-Full image view but must scroll up, down, and from side to side to view the whole image

Arrows (Up and Down)-Increase and then decrease size back to normal view.

Rotated Left-Rotate image to the left.

Original Orientation-Bring image back to original view.

Rotated Right-Rotate image to the right.

Upside Down-Rotate image upside down.

Negative Image-Blackens image to negative mode.

Page Number with Down Arrow-Disabled-Use the Page Number and Arrows above Toolbar

Page Arrows-Disabled-Use the page Number and Arrows above Toolbar

Menu-Lists toolbar options.

Viewer Information and Image Properties-Alternatiff Viewer Information

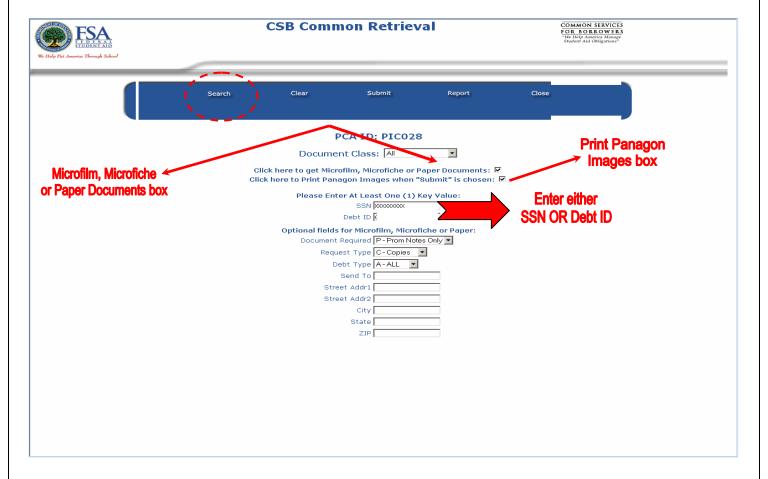
Search for Microfilm, Microfiche Or Paper Documents OR Print Panagon Images

Click in the box next to 'Click here to get Microfilm, Microfiche or Paper Documents' to request non-imaged documents be sent to the requestor or third party. Click in the box next to, 'Click here to Print Panagon Images when "Submit" is chosen: to request the documents be printed and mailed to the requestor or third party. The user will need to:

Select the Document Required Select the Request Type Select the Debt Type Fill in the Recipients Name Fill in the destination

If a recipients name and address are not provided the document(s) will be sent to the requestor based on the DMCS User ID which indicates the user's location.

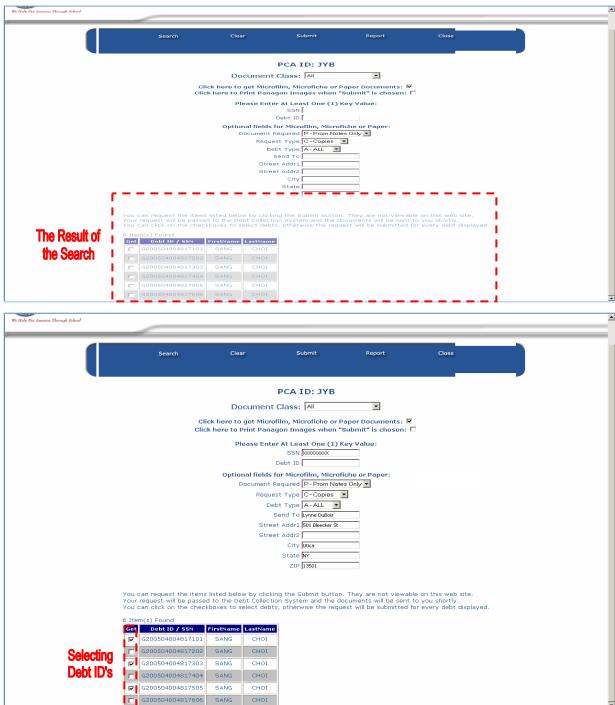
Once you enter a Debt ID or SSN, choose the 'Document Type', 'Request Type', or 'Debt Type' from the drop-down menus if you want to refine your search and click on the 'Search' option.



Results of Microfilm, Microfiche, Or Paper Documents Search

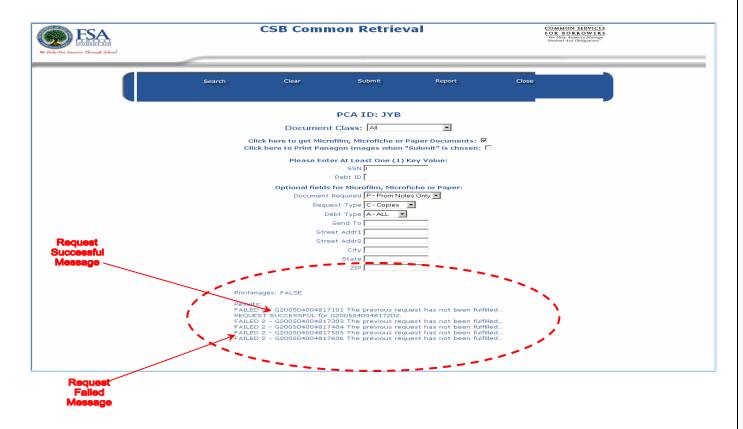
After 'Search' has been chosen, the items pertaining to that SSN or Debt ID will be listed. Check the boxes next to the desired Debt ID's (if all displayed Debt IDs are being requested then no boxes would need to be checked), fill in the recipient's name and address information if you are requesting for a third party. Click the 'Submit' button to request the document(s) get mailed to the intended recipient.

The request will be passed to the Debt Collection System and the document will be sent to the requestor or third party. If you are the requestor the "Send to" and address fields do not need to be completed.



Results of Submit When Microfilm, Microfiche or Paper is Requested

After your request is submitted there will be a message displayed at the bottom of the page explaining 'REQUEST SUCCESSFUL'. The Debt ID(s) being requested will show as well. If any Debts have been requested previously and are still being processed, there will be a failed message stating Debt's have not been sent as "The previous request has not been fulfilled. Further details on the submit button can be found on page 4, 12 and 13.

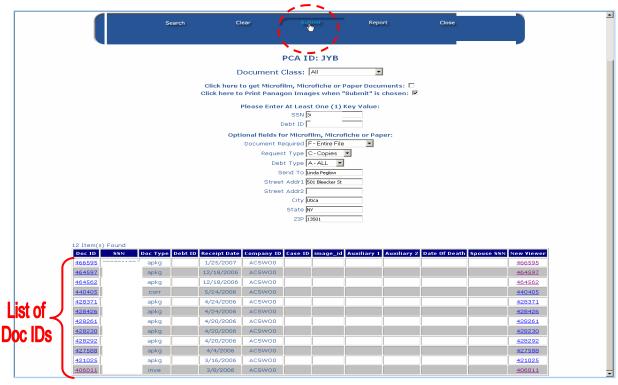


Results of a Request to Print Panagon Images When Clicking Submit

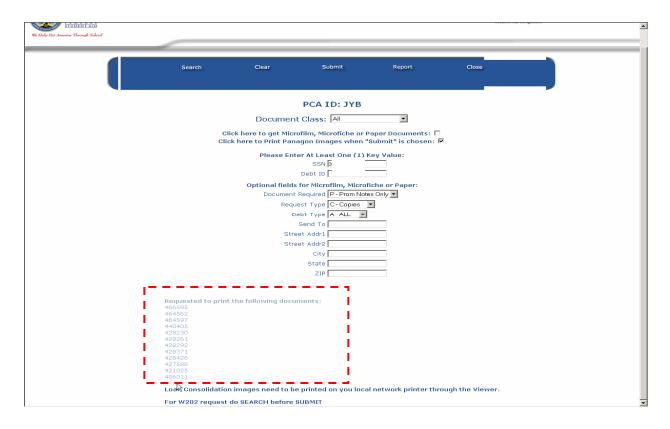
If the user requires Panagon Images to be printed or mailed to a third party, first the user must ensure the search for the documents was preformed as previously explained (input the SSN or Debt ID and click the "Search" button).



Once the search is complete the document(s) will be displayed. The user clicks in the box that states, "Click here to Print Panagon Images when 'Submit' is chosen:". The user then selects the criteria from the drop-down menu options and enters the name and address of the third party. The user then clicks the "Submit" button.



After the user clicks the "Submit" button a list of document ID numbers will be displayed confirming the items that meet the chosen criteria have been requested for print. The request is transmitted to the Greenville Texas Imaging Department where it will be mailed to the intended recipient.



Logging Off the CSB Common Retrieval System

To exit out of CSB Common Retrieval, click on the 'Close' button.

